PRISM AI CONSULTANTS

AI MADE PRACTICAL

FROM PROMPT TO PROFIT | THE FOLLOW-ALONG WORKBOOK

A practical, step-by-step guide to reproducing four webinar business challenges in ChatGPT or Claude, examining the results, and making decisions.

Based on the October 23, 2026 webinar with Dr. Jeff Bullock and Dan Garrett. Expanded teaching edition • October 25, 2026.

PRIVACY-FIRST PUBLIC EDITION: All sample mailboxes, customer names, customer transactions, and sensitive details below are invented. Business examples relating to Jeff's public companies and public regional vision are identified as webinar cases; they are not customer testimonials or claims of achieved outcomes.

Business questions? dan@prismaiconsultants.com | Book: https://calendly.com/dan-prismaiconsultants/prism-workflow-audit

How to use this workbook

You can start with ChatGPT OR Claude. Each exercise has a business question, inputs, a ready-to-paste prompt, review steps, a practical result, and a human decision. A paid subscription or external connector may be necessary for certain account integrations; every exercise also includes a no-connector learning path.

Exercise	Question you can reproduce	Output to aim for
1 • Email	What needs my attention, and what is already done?	A verified executive briefing
2 • Visibility	My business is good; how do more customers find me?	A measurable 30–90 day acquisition plan
3 • Ambition	How do we become number one in our market?	A scoped strategy, pilot and scorecard
4 • QuickBooks	How can I make better use of my accounting information?	An actionable analysis from approved records

BONUS: Have one AI challenge the other; build a short marketing song with lyrics from either AI and music from Suno.

1 | GET READY. BEFORE YOU ENTER BUSINESS INFORMATION

A. Establish a safe practice environment

1. Open https://chatgpt.com and https://claude.ai. Sign into the accounts you intend to use. Check whether you are in a personal account or an organization-managed workspace.

2. Turn on multi-factor authentication wherever supported. Confirm the account owner and company policy for permitted data.

3. For a first run, use the fabricated examples in this workbook. Do not load live customer data simply to practice.

4. Create one new chat per business challenge, give it a descriptive name, and save your finished prompt in a document.

5. Decide what "success" means: a useful and verified answer, not merely a long or confident answer.

B. Reduce optional model-improvement sharing

ChatGPT (personal accounts):

Open account menu → Settings → Data controls → Improve the model for everyone → Off → Done. This affects future training use under OpenAI's stated policy, not chat storage or permissions. Managed business workspaces may have different defaults and controls.

Claude (consumer accounts):

Open account menu → Settings → Privacy → Help Improve our AI models → Off. Anthropic states this stops new chats and coding sessions being used for future model training under that setting, subject to stated safety exceptions. Work/API policies differ.

Important: Turning off training does not prevent the service from processing a submitted prompt, erase previously stored material, remove authorized app access, or guarantee that a source document is safe to upload. Review provider policies and your own obligations. Avoid client secrets, medical records, credit cards, payroll data, passwords, and personally identifying data in teaching examples.

C. Connecting information: ChatGPT and Claude

ChatGPT	Claude
Settings → Plugins → select an eligible Gmail / Outlook app → Install / Connect if shown → authenticate and approve selected permissions.	Open Settings → Connectors / Google Workspace (wording may vary) → connect authorized Google account → inspect scope and approve. For managed workspaces an administrator may need to enable it.
Select / mention the app when making the request. Verify exactly which account is connected.	Ask Claude to use the connected Gmail account, only if connector access is available. Verify it is the correct account.
If connectors are unavailable, paste a redacted sample table or approved export instead.	If connectors are unavailable, use the same redacted sample table or approved export.

Permissions vary by plan, region, workspace and provider. Read the authorization screen; never grant more access than your business permits. For sensitive or client mailboxes, get explicit authorization and review retention and action permissions. For the executive assistant, do not authorize sending merely to practice reading.

What "redacted" means: before sharing a real document for practice, permanently remove or replace details that should not leave your organization, such as customer names, private email addresses, account numbers and confidential prices. Merely drawing a black rectangle over text may leave the text recoverable. The safest first exercise is a new, fictional four-message sample. Redaction is for PUBLIC examples or unapproved sharing; a properly authorized live executive briefing should retain the real names and details needed for you to act.

D. Copy, speak, inspect, verify

- Use the microphone or type; review dictated names, URLs and numbers before sending.
- Ask for sources: relevant message dates/subjects, original documents or transaction identifiers, without public disclosure of personal data.
- If an AI claims it connected to a system, inspect that connection or compare its answer to the underlying data.
- Read the complete answer, highlight facts versus assumptions, and have a human approve all customer communications or financial actions.

2 | THE TWO FRAMEWORKS

Capture ● Connect ● Direct (Jeff's three-part method)

Capture	Connect	Direct
Supply relevant context: spoken description, approved notes, transcripts, spreadsheets, or sample data.	Authorize the needed service or supply a file manually; do not assume it can see your systems.	Assign the task, specify the desired deliverable, challenge uncertainty, review and act.

The five stages of a strong prompt

A prompt is the complete set of instructions you give the AI. Jeff calls the fifth stage the "Command", the specific task or deliverable inside that overall prompt. It is not a separate software command. You can speak the full prompt naturally or type it.

Stage	Ask yourself	What to include
1. Role	Who should the AI be?	Begin "You are an experienced sales operations specialist…" Define the expertise and responsibility of the AI.
2. Context	Who are YOU, and what is the situation?	Start with your own experience, role and company. For example: "I am a sales and marketing specialist with 45+ years of experience across industries and international markets." Then describe your audience, available information and constraints. You bring knowledge and judgment to the conversation.
3. Problem	What is wrong and why?	Explain what is wrong and why it matters; avoid prescribing the solution too early.
4. Goal	What would success look like?	Describe the desired outcome, timeframe and measurable definition of success.
5. Command	What exactly should the AI do now?	Give the final instruction: "Create a prioritized plan…" Include

	requested format, sources, assumptions and next steps. All five stages together form your PROMPT; this fifth stage is its command or direct request.

Tip: More words are not automatically better. Give enough useful context, then refine. A good prompt is a starting point for a conversation, not a magic incantation.

COPY-AND-ADAPT MASTER PROMPT:

ROLE: You are an experienced [type of specialist] with expertise in [relevant discipline].
CONTEXT: I am [your role and relevant experience]. My organization is [business type/industry].
Here is the situation, approved background information and any limitations: [details].
PROBLEM: The specific problem is [what is wrong] and it matters because [why].
GOAL: Success means [specific result], by [when], measured by [metric or observable result].
COMMAND (the final request within this prompt): Create [plan/table/analysis/draft]. Identify assumptions and evidence, rank practical next actions, and tell me what to verify before making a decision.

3 | EXERCISE ONE. BUILD AN EXECUTIVE EMAIL ASSISTANT

Webinar question: "Can AI examine my incoming and sent correspondence, identify what matters, and tell me what to do next?" Dan demonstrated a two-account briefing. This workbook NEVER reproduces his personal account identifier, family details or actual customer correspondence.

Practice with an invented mailbox first

Privacy distinction: workbook illustrations use invented names because they are public. Your private executive briefing should show actual names, organizations and appointments drawn from accounts you are authorized to access. A label such as "Customer A" is not helpful when you need to know whom to call. Check the originals before taking action.

Message (fictional)	Status (fictional)	What an assistant should notice
Client A: Request for updated proposal, due Thursday	Incoming; no reply	Action due; confirm priority
Vendor B: Invoice question	Incoming; sent reply yesterday	Probably resolved; verify sent response
Prospect C: Wants available times next week	Incoming; no reply	Schedule follow-up
Newsletter: monthly industry digest	Incoming	Informational

Method A. ChatGPT

1. Complete "Get Ready." Connect authorized Gmail/Outlook in Settings → Plugins if you actually need live mail. Or paste only the fictional four-row sample above.

2. Open a NEW chat. Add the shared prompt below. For practice, change "connected mailbox" to "fictional sample table above."

3. If using a connector, request last seven days of incoming AND sent correspondence, and identify which approved account(s) were searched.

4. Examine the briefing. Open the cited original email and sent reply to verify each claimed completion and deadline.

5. Correct mistakes, revise priorities, and ask for a five-item action list. Do not send anything without review.

Method B. Claude

1. Complete "Get Ready." If the approved Gmail connector is available, authorize the correct account; otherwise paste the same fictional sample.

2. Open a NEW Claude chat. Paste the identical shared prompt below, adjusting the scope to the connected account or sample table.

3. If more than one mailbox is needed but the connector cannot reach both in one task, process each separately and merge only sanitized summaries.

4. Check cited source messages against the actual mailbox, reconcile completed actions with sent mail, and keep final sending under human control.

Copy-and-paste executive briefing prompt

ROLE: You are my experienced executive assistant and business operations analyst.
CONTEXT: I run a small company. Use ONLY my approved connected business mailbox(es), or the fictional email table pasted in this chat. Do not infer access to other accounts. For the fictional exercise, use the sample names supplied. For my privately viewed, authorized real briefing, identify ACTUAL people, organizations, and dates so I know precisely who requires attention.
PROBLEM: I can miss messages and repeat work because incoming and sent mail are in different places.
GOAL: Give me an accurate, concise executive briefing that identifies business commitments and next actions.
COMMAND: Review the past 7 days within the available authorized sources. For each important thread, show the person's name and organization (as given in the source), topic, why it matters, promised action, deadline (or "not found"), whether a reply or completion is documented in sent mail, and your suggested next step. Separate high / medium / informational. End with my top five priorities, evidence/source references, and anything you could NOT verify. Do not invent names, meeting times, commitments or completed actions. Do not draft or send messages unless I ask separately. Do not publish the resulting briefing.

Check your result

- Did the AI actually access the right mailbox (or just the sample)?
- Are all deadlines real and consistent with the original thread?
- Has it checked SENT messages before calling an item unresolved?
- For a REAL authorized briefing, did it identify the actual people, organizations and dates accurately? For a PUBLIC example, are those details fictional or properly redacted?
- Is each top priority tied to a specific verified action?

WORKBOOK RESULT: One-page executive briefing + prioritized tasks + a human-reviewed response plan. Optional next step: request a draft reply, inspect it, and send manually.

4 | EXERCISE TWO. GREAT BUSINESS, LOW VISIBILITY

Webinar question: A successful AI-enabled virtual-assistance business delivers useful work, but needs more prospective customers to recognize the brand. How can it grow without confusing its identity with a second company? This is a teaching adaptation of Jeff's Valley Support Company challenge.

Run it in either AI

1. Choose a fictional business (for example, Valley Support Co.) or describe your own without confidential client names.

2. Open a new ChatGPT or Claude chat. Paste the prompt. Include your real website URL only if you are comfortable having public content reviewed.

3. Ask the AI to identify strengths, messaging gaps, likely customer segments and marketing channels. Require clear support for any website claims.

4. Request a 30–90 day plan. Select ONE channel first; define the metric and starting baseline.

5. Challenge the plan in the other AI using Exercise Five.

ROLE: Act as a senior small-business marketing and sales strategist.
CONTEXT: My fictional business provides AI-enabled virtual assistance to small firms. We have satisfied customers but most leads come through the founder. Our founder also leads a separate AI consulting company; the brands must remain distinct. Budget is modest and staff time is limited.
PROBLEM: Good delivery is not producing consistent independent visibility and qualified leads.
GOAL: Build a repeatable customer acquisition approach without blurring the brands.
COMMAND: Diagnose likely causes, list questions you need answered, propose three target customer segments, clarify positioning for each brand, rank four marketing channels, suggest three case-study concepts, and create a practical 30/60/90-day action plan with estimated effort, KPIs and risks. Mark assumptions and any unverified website claims.

What the webinar documents illustrate

The ChatGPT Valley Support Company analysis shifted the focus from "selling assistant hours" to completed business results, customer proof, LinkedIn, referral partners, search visibility, and better follow-up. Its proposed 90-day targets were planning targets, not verified projections. Do not present them as achieved results.

The answer should contain	Management checks
A clearly expressed buyer problem	Do real customers describe the problem this way?
One prioritized customer segment	Does current sales history support this segment?
Three specific marketing experiments	Who will run each and with what budget?
A conversion measurement plan	Do we know present leads and close rates?

WORKBOOK RESULT: One clear message, one target audience, a testable campaign and an owner for the next 30 days.

5 | EXERCISE THREE. "HOW DO WE BECOME NUMBER ONE?"

Webinar question: Dr. Jeff Bullock asked how the Lehigh Valley could become America's leading region for small-business AI implementation. A reader could ask the same type of question about a new company:

"How do I become the number-one business in my market?" The process is the lesson; no AI output establishes that any business or region is already number one.

Start with the big goal, then make it measurable

1. Choose your market: town, region, customer category, or industry. State your starting size, resources and practical time horizon.

2. Define "number one": largest share, highest customer retention, best reviewed, strongest profitability, highest measured impact or another objective definition.

3. Run the prompt in ChatGPT or Claude. Ask for a baseline, competitors, gaps, partnerships and a small proof-of-concept program.

4. Require a first 90-day plan, not an unlimited wish list. Ask how each claim will be independently checked.

5. Run the draft through the other AI as a critic; make the final choice yourself.

ROLE: You are an experienced growth strategist and skeptical operating advisor.
CONTEXT: I am starting [a fictional local business / regional initiative] serving [market]. Current resources: [team, money, relationships]. Our ambition is to become the number-one [business / region] for [clearly defined service or outcome] within [time horizon].
PROBLEM: The ambition is broad, and we do not yet know how to define leadership or prove progress.
GOAL: Turn the ambition into a credible, financially sustainable program with measurable milestones.
COMMAND: Offer three alternative definitions of "number one"; suggest a scorecard and baseline measures; map likely competition or partners, explicitly labeling unverified assertions; design a small pilot; draft a scoped 90-day plan with people, cost, timing, risk and expected evidence; name assumptions to verify before spending money. Do not claim leadership without comparable independent data.

Real webinar example: two AI opinions

In the detailed regional strategy, ChatGPT proposed a 25-business, five-industry pilot and first-year goals such as 500 assessments and 150 implementations. Claude's review challenged the scale for the current team and recommended approximately 10–12 pilot firms across two or three sectors and a limited set of repeatable packages. Neither proposal was a confirmed commitment; both were planning ideas.

First analysis suggested	Second analysis challenged	Takeaway for a business owner
25 firms across five sectors	Start with ~10–12 in 2–3 sectors	Shrink scope until you can deliver well
Large first-year activity targets	No staffing and cost model yet	Budget and capability must support ambition
Regional partnerships and impact dashboard	Prove outcomes before grand branding	Measure evidence before claiming leadership

A useful distinction from the original analysis: training attendance is an activity; working implementation is an outcome. For a business, marketing impressions are an activity; qualified customers and profitable repeat purchases are closer to outcomes.

WORKBOOK RESULT: A definition of leadership, metrics, a constrained pilot, an investment decision and a review date.

6 | EXERCISE FOUR. QUICKBOOKS FRUSTRATION TO SALES INSIGHT

Webinar question: “QuickBooks is cumbersome. Should I keep using it? Can AI help me ask better business questions?” Dan briefly showed a separate financial/dashboard prototype using QuickBooks sandbox/sample information. It was NOT an automatic guarantee that every ChatGPT or Claude account can read QuickBooks directly.

Begin with the accounting problem, not the software

1. Write down three frustrations: reporting, receivables, sales changes, reconciliation, categorization, or data entry.

2. Ask whether you need a simpler report, a different workflow, a verified data export, an authorized connector, or a custom dashboard.

3. For safe practice, create or export a de-identified CSV: Customer ID, Period, Net Sales, Category and optionally Gross Margin. Do not upload client accounting records without authorization.

4. Use the same CSV in ChatGPT and Claude; require period comparisons, source arithmetic and uncertainty notes.

5. Only after validating the pilot should you consider a live integration. An approved QuickBooks connection may require a connector/provider authorization or an Intuit developer OAuth setup; do not enter bank credentials into prompts.

Simple fictional data you can type into a spreadsheet

Customer ID	Prior-year sales	Current-year sales	Category
C-001	$50,000	$30,000	Maintenance
C-002	$24,000	$28,000	Installations
C-003	$18,000	$0	Maintenance
C-004	$12,000	$15,000	Service

The figures are fictional and deliberately simple. Ask the AI to calculate declines and growth, flag missing transactions or seasonality, and suggest human follow-up. Do not interpret “zero” as lost business without checking contract and timing.

ROLE: Act as a sales intelligence analyst working with small-business accounting exports.
CONTEXT: I will attach or paste a permitted, de-identified table of customer sales by period. Use only the supplied records.
PROBLEM: My accounting software stores useful transactions, but I do not know which accounts may be declining or where follow-up could increase revenue.
GOAL: Identify a short, reliable set of sales decisions.
COMMAND: Validate columns and periods; calculate each customer’s absolute and percentage change (label undefined percentages); rank declines; separate observed facts from hypotheses; list data quality questions and suggested human follow-ups; show the arithmetic. Do not make up transactions or call speculative opportunity “booked revenue.”

How to extend to QuickBooks responsibly

ChatGPT: Look in Settings → Plugins for a legitimate supported QuickBooks app, confirm publisher, scopes, availability and permitted actions before connecting. Claude: check its available connectors; if QuickBooks is

unsupported, use an authorized export or a separately developed integration. An Intuit sandbox custom integration involves developer registration, OAuth 2.0 authorization and appropriately scoped API access, an advanced development project, not a one-click step.

WORKBOOK RESULT: A verified list of customer revenue changes, three follow-up actions, and a decision on whether a simple export or more advanced dashboard is worthwhile.

7 | EXERCISE FIVE. HAVE AI CHALLENGE AI

This is the “real second opinion” lesson from Jeff’s regional strategy. A second model is not an independent auditor and may repeat the same mistakes; use it to widen the questions you ask.

1. Save the first AI output as plain text. Remove any customer names, proprietary figures or personal information.

2. Open the OTHER AI (ChatGPT → Claude or Claude → ChatGPT) and paste the critique prompt below followed by the sanitized plan.

3. Request a revised small-scale option. Independently confirm claims, pricing, organizations, sources and numerical assumptions.

4. Choose a feasible next action and record who owns it, what it costs, and what evidence would justify continuing.

Act as a rigorous, independent business reviewer, not a cheerleader. Critique the plan below. Separate verified claims, unsupported claims, assumptions and predictions. Identify costs, staffing needs, legal/privacy exposure, likely failure points and overambitious targets. Offer a smaller 30-day test and a realistic 90-day option, with success/failure criteria. Identify what must be checked with primary sources. Then summarize the best decision choices for management. PLAN: [paste sanitized draft]

Keep	Change	Verify before acting
Specific, measurable outcomes	Overlarge pilots or unsupported targets	Current capability, costs and data sources
Clear implementation steps	Claims of certainty without evidence	Third-party organization details and permissions
Customer-focused message	Generic praise and broad promises	Real customer needs and economics

8 | BONUS. CREATE A SHORT PROMOTIONAL SONG

The webinar used Claude for original lyrics and Suno for music. ChatGPT may be used for the same lyric-writing stage. This is a creative demonstration, not a promise of guaranteed sales outcomes.

1. In ChatGPT OR Claude, describe a fictional business, the audience, campaign objective, musical style and 20–35 second target length.

2. Ask for original verse/chorus/tag lyrics with a clear business message; correct awkward phrases and unsupported claims.

3. Sign in at https://suno.com; choose a suitable creation mode, use original authorized lyrics, describe style, and generate alternatives.

4. Listen all the way through, revise pronunciation/tempo/lyrics, and check Suno terms and commercial-use rights for your plan before public marketing.

5. Share a permitted link using the service's Share function; test that your audience can access it.

Write ORIGINAL lyrics for a 25–35-second upbeat promotional song for a fictional local service business. Audience: owners of small companies. Theme: useful AI saves administrative time so people can focus on customers. Structure: short verse, memorable chorus, closing tag. Avoid copying any existing song, artist style, or unverified performance claims. Provide a separate simple style description suitable for a music-generation tool.

9 | TURN THE OUTPUT INTO A BUSINESS DECISION

One-page action worksheet

Challenge and current business baseline: _____

AI output and sources reviewed: _____

Most promising recommendation: _____

Largest uncertainty or privacy risk: _____

Owner of first next step: _____

Expected cost, time and benefit: _____

Measurement and review date: _____

Decision after review: continue / change / stop:

_____

Example measurement: If a process frees 20 minutes each of 220 working days, that is about 73 hours of staff capacity annually. At an illustrative $60/hour value, that is approximately $4,400 of potential capacity, not necessarily cash savings. To claim savings, verify actual spend falls; to claim revenue, verify realized incremental sales. Do not double-count.

10 | QUICK REFERENCE & TROUBLESHOOTING

Problem	Next move
No Gmail connector listed	Check plan, region, organization permission; fall back to sanitized sample data.
AI says it cannot see sent email	Review connector permissions/capabilities; inspect sent folder manually.
ChatGPT and Claude disagree	Compare evidence, assumptions and cost, not which AI sounds confident.
"Number one" has no definition	Pick measurable market, timeframe and comparison criterion.
QuickBooks analysis looks wrong	Validate dates, credits, accounting basis, transaction-level totals.
Output discloses identities	Stop sharing; remove identifiers and regenerate using invented labels.

SETUP & PRIVACY RESOURCES • Reviewed October 2026

- ChatGPT privacy: help.openai.com/en/articles/7730893-data-controls-in-chatgpt
- ChatGPT connectors: help.openai.com/en/articles/20001494-connecting-and-managing-app-accounts-in-chatgpt
- Claude privacy: privacy.claude.com/en/articles/12109829-how-do-i-change-my-model-improvement-privacy-settings
- Claude connectors: support.claude.com/en/articles/10166901-use-google-workspace-connectors
- QuickBooks developer guidance: developer.intuit.com
- Suno creation and licensing: help.suno.com

Features and permissions vary by account and change over time. Verify results, protect personal information, and review professional requirements before acting.

STUCK ON AN EXERCISE? Email Dan: dan@prismaiconsultants.com. Tell me where you got stuck (no passwords or private records), and we can talk through a practical next step.

TALK WITH DAN • SCHEDULE A DISCOVERY MEETING

